



Presumptive Accreditation

Continuing Education Course Providers

Specific agencies and entities have been granted presumptive accreditation to provide continuing education courses for credit as per IDAPA 12.01.10, Rules Pursuant to the Idaho Residential Mortgage Practices Act, without prior submission for approval to the Department. These agencies and entities are:

- The Idaho Department of Finance
- The National Association of Mortgage Brokers
- The Mortgage Bankers Association
- The National Association of Professional Mortgage Women
- The Idaho Housing and Finance Association
- Federal National Mortgage Association
- Federal Home Loan Mortgage Corporation
- The American Bankers Association
- Regulatory agencies of any state or of the United States that have regulatory authority over mortgage related activity
- Institutions of higher education accredited by the Idaho State Board of Education or by similar accrediting agencies of any other state
- The Conference of State Bank Supervisors
- The American Association of Residential Mortgage Regulators

Courses provided for credit by these agencies must adhere to the following:

- course must be an approved topic as per Subsection 010.03 of the Rules, offered by the providing agency; and
- instructors must be an employee of, or a certified trained instructor agent of, the providing agency.

Providers may submit agendas, listing topics and instructors, for pre-review of acceptance verification using the Form EDU-900. Schedules of course offerings may be provided using Form EDU-901. Complete attendance rosters must be submitted to the Department within 30 days of course completion. Each attendee must be provided with a course and instructor evaluation. Forms are provided in this packet, and additional forms, if needed, are available on the Department's website (<http://finance.idaho.gov>) in the education forms section.

Continuing Education courses must provide no less than one hour of classroom or web-based instruction.

CONSUMER FINANCE BUREAU
800 Park Blvd Ste 200, Boise, ID 83712
Mail To: P.O. Box 83720, Boise ID 83720-0031
Phone: (208) 332-8002 Fax: (208) 332-8096
<http://finance.idaho.gov>

Completion certificates must specify student's name, provider's name, name of course taken, course number/identification, credit hours granted, and date of course completion.

Instruction focusing on sales, marketing, commercial lending or brokering, motivational in nature, or skills pertaining to running a business will not be considered for credit purposes.

Successfully completed approved courses of accredited instruction may not be repeated for credit hours with the same education provider within the same reporting period.

The Department prohibits the marketing, soliciting or selling of products or services during the instruction of any C.E. course. If the provider intends to market, solicit or sell products or services before the start of instruction, or after course instruction completion, a detailed information notice must be included in all course materials with product/service description, cost and refund policy.

If you have any questions or need further information, please contact the Department.



PRESUMPTIVE ACCREDITATION

Transmittal for Agenda Review

Please type or print legibly

Company or organization providing the course:

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____ Fax: _____ Web address: _____

Contact Person: _____

Phone: _____ Fax: _____ Email: _____

Course Title: _____

Course Cost: _____ **Credit Hours Requested** _____

Attach an agenda outlining the course topics, time spent on each topic and a brief description of material to be covered (*if not included in agenda*).

Instructors must be an employee of, or a certified trained instructor agent of, the providing agency.

Is this course available as a distance course? (refer to course criteria information) ☐ Yes ☐ No

Method of presentation: ☐ Classroom ☐ Web-based

I certify that the information contained in transmittal herein is true to the best of my knowledge, that I have reviewed the Rules governing continuing education in Idaho, have reviewed the instructions and course criteria information, and agree to comply with same.

Date

Authorized Signature/Title

Typed/Printed Name

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CONTINUING EDUCATION COURSE OFFERING SCHEDULE
Presumptive Accreditation

NAME OF PROVIDER ENTITY			
ADDRESS	CITY	STATE	ZIP
CONTACT PERSON	PHONE	EMAIL	

COURSE NUMBER	DATE COURSE OFFERED			COURSE CREDIT HOURS	COURSE TITLE	COURSE LOCATION <i>City, State</i>
	MO.	DAY	YEAR			

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COURSE AND INSTRUCTOR EVALUATION

The purpose of the evaluation is to further assist the Department of Finance in better serving the educational needs of mortgage industry licensees. Your answering the applicable questions below would be appreciated. Please mail or fax to the numbers below, or email to kc.schaler@finance.idaho.gov.

Name of Course Provider (company)	Date Course Takes (month/year)
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Name of Course	Course Number (7 digits)	Instructor (if applicable)
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Presentation Method

☐ Live/Seminar ☐ Internet ☐ Other (explain)

EVALUATION

Please rate on a scale of 1 to 5, with 1 being poor and 5 being good. Circle the appropriate answer.

1. The instructor was knowledgeable and up-to-date on the course subject. 1 2 3 4 5 NA
2. The instructor was well organized and easy to understand. 1 2 3 4 5 NA
3. The instructor got sidetracked from the course subject with an excessive amount of war stories, jokes, personal experiences, etc. 1 2 3 4 5 NA
4. The instructor promoted the sale of products or services (tapes, text, membership, etc) *during* the educational instruction portion of the course. 1 2 3 4 5 NA
5. The educational materials (outline, text, video, etc) was well prepared and easy to understand. 1 2 3 4 5 NA
6. The handout materials, if any, will be useful to me. 1 2 3 4 5 NA
7. The presentation increased my knowledge of the course subject matter. 1 2 3 4 5 NA
8. I am better able to serve and protect consumers with knowledge I learned in this course. 1 2 3 4 5 NA
9. I would enroll in another course or presentation offered by this provider. 1 2 3 4 5 NA
10. I would rate this course as:
☐ Excellent ☐ Above Average ☐ Good ☐ Fair ☐ Poor
11. Do you have any suggestions for future course topics? (If yes, please list below) ☐ Yes ☐ No
12. Would you like to be contacted by a Department of Finance representative? ☐ Yes ☐ No

If Yes, provide name	Daytime Phone Number
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Comments/Suggestions: _____

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